



**Web-based Reporting Form**

**User Access Instructions**

**Fiscal Year 10/11**

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## Accessing FY 10/11 Web-based Forms (First-time Users)


### Log in instructions (first-time users)

This section displays the opening “Log In” or entry page and lists the steps to access the Annual Report, School Readiness and Power of Preschool reporting forms.

**Note:** The county Executive Director must grant access to the system by e-mailing confirmation to [evaluation@ccfc.ca.gov](mailto:evaluation@ccfc.ca.gov).

The system issues first-time users a temporary password and users must create a permanent password the first time they log-in using the following instructions:

Step	Action
1	Log onto the Internet by selecting the icon representing your Internet browser. Examples: Microsoft Internet Explorer (IE), Firefox, etc.
2	Access the Annual Report Log-In page by typing <a href="http://www.first5eval.com/evaluation/reportingtools.asp">http://www.first5eval.com/evaluation/reportingtools.asp</a> in the address bar. Click ‘Go’ or hit the enter key
3	Select “Annual Report Web-based Reporting System Application”
4	If you reach a screen that reads “ <b>There is a problem with this Web site's security certificate.</b> ” Please continue by selecting “ <b>Continue to this Web site (not recommended)</b> ”
5	The “Log In” window (example located below) appears on the right side of the screen. In this window, enter your User Name and Temporary Password



### Welcome to First 5 California's new Web-based Reporting System!

This online service allows First 5 county commissions to submit Annual Report, School Readiness and Power of Preschool data via the internet. In addition to these new Web-based forms, we reformatted our Annual Report and School Readiness Guidelines, and created a new Power of Preschool Reporting Handbook. Together, these tools fully support First 5 county commission Annual Report, School Readiness and Power of Preschool data reporting requirements. We hope you find the forms and guidelines instructive and easy to use.

If you have any questions on Annual Report or School Readiness reporting, please contact the Institute for Social Research at (800) 311-4905 or [isr-02@csus.edu](mailto:isr-02@csus.edu).

All other questions (including those on Power of Preschool reporting) may be submitted in writing to [evaluation@ccfc.ca.gov](mailto:evaluation@ccfc.ca.gov).

**Log In**

User Name:

Password:

[Forgot Password](#)

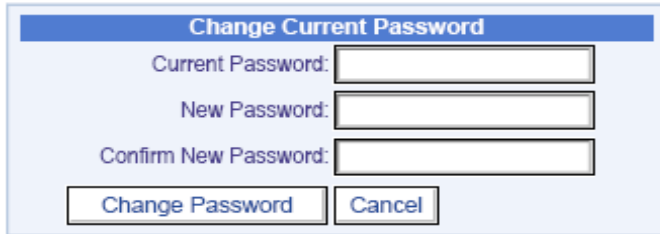
Log In

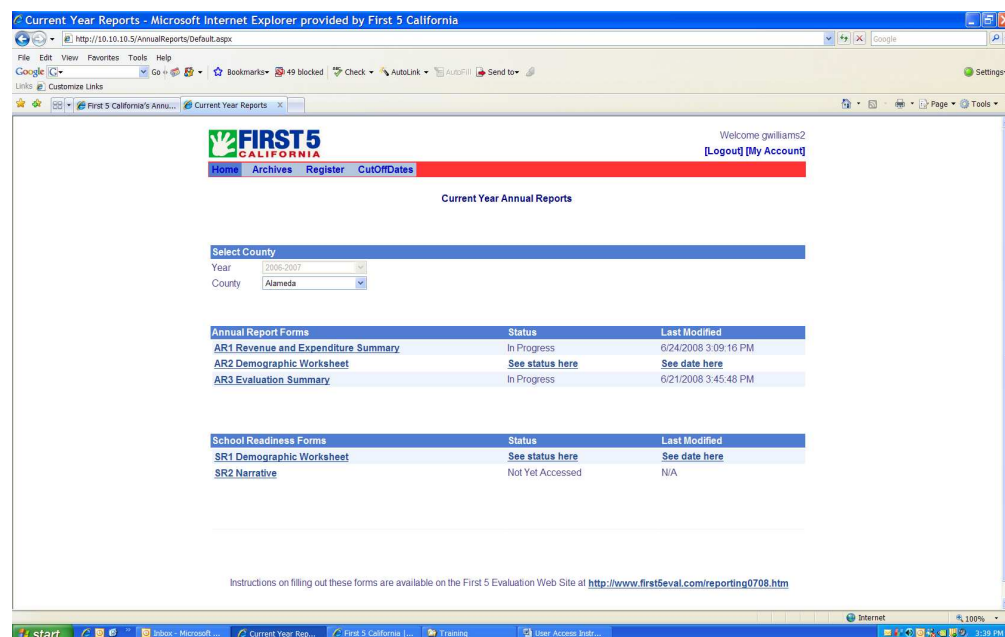
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# Accessing FY 10/11 Web-based Forms (First-time Users) (First-time Users), Continued

## Create a permanent password – first-time users

All first-time users must create a permanent password using the following process:

Step	Action
1	The system requires first time users to update their password upon entry to the system; the “Change Current Password” screen will display: 
2	Enter your current (temporary) password.
3	Create and enter your new (permanent) password. <b>The password is case sensitive and must have at least 7 characters and include one symbol</b>
4	Confirm (re-enter) your new password
5	Press the “Change Password” button
6	System will confirm your password has been updated
7	Upon successful log in, the system displays the “Home Page” titled “Current Year Annual Reports” (example located on following page)




## Accessing FY 10/11 Web-based Forms (Subsequent Users)

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### Accessing the forms (subsequent users)

This following explains the steps subsequent users must use to access the Annual Report, School Readiness and Power of Preschool forms:

Step	Action
1	Log onto the Internet by selecting the icon representing your Internet browser. Examples: Microsoft Internet Explorer (IE), Firefox, etc.
2	Access the AR Log In page by typing <a href="http://www.first5eval.com/evaluation/reportingtools.asp">http://www.first5eval.com/evaluation/reportingtools.asp</a> in the address bar; click 'Go' or hit the enter key
4	Select "Annual Report Web-based Reporting System Application"
5	Enter User Name and Password into appropriate fields. 
6	Click Log In

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## How to Get a New Password

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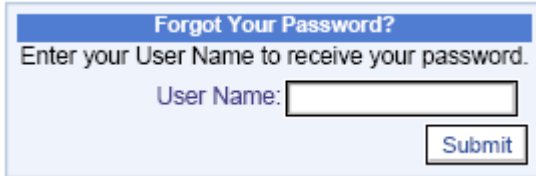
### Getting a new password

After five unsuccessful attempts to log into the system, the system will lock the user out. The user must obtain a new password. This section describes how to obtain a new password. The following message appears if you have entered an incorrect password:



The screenshot shows a 'Log In' form with a blue header. Below the header, there are two input fields: 'User Name:' with 'User ID' entered, and 'Password:'. Below these fields, a red error message reads: 'Your login attempt was not successful. Please try again.' At the bottom right is a 'Log In' button, and at the bottom left is a blue underlined link labeled 'Forgot Password'.

The following table provides instructions on how to create a new password:

Step	Action
1	Click on the “Forgot Password” link 
2	Enter your User Name in the field and press Submit 
3	The following message will appear:  Temporary password has been sent to your registered e-mail address. <b>Note:</b> System will notify <b>User</b> via e-mail that the password has been changed
4	Retrieve the new temporary password from the registered e-mail account
5	Log in to the system again, using the temporary password. Users will be instructed to create a new (permanent) password upon log in following “Log In Instructions (First Time Users)”


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# Updating User Information

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## Changing user information

Users who would like to change their contact information (e-mail address and/or phone number) may use the following process:

Step	Action
1	When logged-in to system and at the "Home" page, click on "My Account" link located on the upper-right side of the Web page
2	Click on "Edit Contact Info" link located on top of the current User information
3	Update contact information (i.e., Phone Number, E-Mail) in respective field 
4	Click Update
5	Information will be updated and stored in the system
6	Whether changes are made or discarded, User is redirected back to the "Home" page

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## Logging Out of Annual Report Site

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### Log out procedures

Users must use the following process to log out of the system:

Step	Action
1	Click the “Logout” link on any page, located in the upper-right side corner next to the “My Account” link
2	Upon system logout, the “Entry Page” is displayed
3	After 45 minutes of inactivity, system automatically invalidates session and user is logged out  <b>Note:</b> Upon automatic logout due to inactivity, any information entered without saving will be lost; please be sure to save your data often

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## Annual Report Data Entry, Saving, and Submission

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### Submitting annual report data

The following table lists the steps for entering, saving and submitting data:

Step	Action
1	Upon log in, "Home Page" lists Annual Report, School Readiness and Power of Preschool forms to complete for the report submission, along with a status of the form ("Not Yet Accessed", "In Progress" or "Submitted") and a Last Modified date
2	Click desired form; for AR-2 and SR-1 forms, select the form name, and proceed to the following screen to select a new result/service specific form, or existing form
3	Fill in information in respective fields  <b>Note:</b> In the event invalid data is entered, the system will inform the User of what needs to be corrected and returns the User back to the form to correct mistakes
4	On forms which are only one page in length, to save entered data, click "Save" at the bottom of the screen  On forms which are multiple pages in length, and to navigate between pages, click "Save & Next" (to navigate to the following page) or click "Save & Back" (to navigate to the previous page) at the bottom of the screen; for AR-1 result/service detail windows, click "Save" and then "Close" to return to the form; navigating forms using the "Back" arrow on your Internet browser will not save data to the system and will cause data entered to be lost
5	Navigate between forms using the "Home" link at the top left of each screen.; navigate between multiple pages of a single form using the "Save & Next" and "Save & Back" buttons at the bottom of the screen.
6	Data entered and saved is accessible via subsequent log ins, and for other county users


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## Annual Report Data Entry, Saving, and Submission, Continued

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### Submitting annual report data (continued)

Step	Action
7	<p>When all changes have been made and data is in final form, data is submitted by agreeing to the following language and entering the submitting User's certification info (below):</p> <p><b>"I hereby certify the information submitted herein is accurate and complete to the best of my knowledge. I further certify that I have the authority to submit this information. I make these certifications via my electronic signature, which is affixed hereto."</b></p>  <p>When data entry is complete, click "Submit"</p>
8	<p>Upon successful form submission, system will notify user</p> <p><b>"Your (Form Name) has been successfully submitted. Thank you."</b></p> <p>The "Home Page" will reflect the form's submitted status and date</p>

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## Viewing and Printing Forms

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### Viewing and printing submitted forms

The table below specifies the steps to view and print submitted forms:

Step	Action
1	Upon log in, "Home Page" lists Annual Report and School Readiness forms to complete for the report submission, along with a status of the form ("Not Yet Accessed", "In Progress" or "Submitted") and a Last Modified date.
2	Click the "Print" button (located to the right of the form's "Last Modified" field). For AR2 or SR1 forms, please click the "Print" button located on the sub-menu.
3	To print your complete (before or after submission) report, use the "Select a Format" drop-down menu to select your preferred format (Adobe PDF provides the highest quality) and click the "Export" button.
4	The output will then be displayed and can be printed from the selected application.
5	Upon successful printing of your form, please click the "Back" button to return to the "Home Page."

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# Adjusting Resolution

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## Adjusting resolution

The First 5 California Annual Report Web-based Reporting System application is best viewed with a resolution of at least 1024 x 768. To adjust your resolution, complete the following steps or contact your county IT staff for assistance.

To change your resolution on a PC running Windows XP in order to avoid having to scroll when filling out the online forms please follow the instructions below.

Step	Action
1	Go to "Start"
2	Go to "Control Panel"
3	Click on "Appearance and Themes" or "Display"
4	Select "Change the Screen Resolution"
5	Click on the "Settings" tab
6	Move the slider to at least 1024 x 768

If you are using Windows Vista or Windows 7 you can follow the instructions below.

Step	Action
1	Right click on a blank spot on your Windows desktop
2	Select Properties
3	Select the Settings tab
4	Move the slider to at least 1024 x 768

## Report Re-Submission

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### Editing and resubmitting forms

After a user submits a form, they can edit and resubmit an updated form. All editing and resubmitting must occur **prior to November 1, 2011**. The following table specifies the process for resubmitting a form:

Step	Action
1	Open submitted report to be edited and resubmitted.
2	Click on “Resubmit” button in top right of form (For forms of multiple page length, “Resubmit” button is located on the first page)
3	Form will be unlocked, and data will again be editable for the User.
4	User may update/change data previously entered. As prior to submission, data must be saved using the “Save”, “Save & Back”, or “Save & Next” buttons. When editing is complete, users may resubmit the form using the procedure described in the “Annual Report Data Entry, Saving and Submitting Section”

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